

Altiris™ Barcode Solution 7.1 SP2 from Symantec™ User Guide



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Symantec's support offerings include the following:

- A range of support options that give you the flexibility to select the right amount of service for any size organization
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For information about Symantec's support offerings, you can visit our Web site at the following URL:

www.symantec.com/business/support/

All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policy.

Contacting Technical Support

Customers with a current support agreement may access Technical Support information at the following URL:

www.symantec.com/business/support/

Before contacting Technical Support, make sure you have satisfied the system requirements that are listed in your product documentation. Also, you should be at the computer on which the problem occurred, in case it is necessary to replicate the problem.

When you contact Technical Support, please have the following information available:

- Product release level

- Hardware information
- Available memory, disk space, and NIC information
- Operating system
- Version and patch level
- Network topology
- Router, gateway, and IP address information
- Problem description:
 - Error messages and log files
 - Troubleshooting that was performed before contacting Symantec
 - Recent software configuration changes and network changes

Licensing and registration

If your Symantec product requires registration or a license key, access our technical support Web page at the following URL:

www.symantec.com/business/support/

Customer service

Customer service information is available at the following URL:

www.symantec.com/business/support/

Customer Service is available to assist with non-technical questions, such as the following types of issues:

- Questions regarding product licensing or serialization
- Product registration updates, such as address or name changes
- General product information (features, language availability, local dealers)
- Latest information about product updates and upgrades
- Information about upgrade assurance and support contracts
- Information about the Symantec Buying Programs
- Advice about Symantec's technical support options
- Nontechnical presales questions
- Issues that are related to CD-ROMs or manuals

Support agreement resources

If you want to contact Symantec regarding an existing support agreement, please contact the support agreement administration team for your region as follows:

Asia-Pacific and Japan	customercare_apac@symantec.com
Europe, Middle-East, and Africa	semea@symantec.com
North America and Latin America	supportsolutions@symantec.com

Contents

Technical Support	3
Chapter 1 Introducing Symantec Barcode Solution	9
About Barcode Solution	9
What you can do with Barcode Solution	10
Components of Barcode Solution	11
What's new in Barcode Solution 7.1 SP2	12
Where to get more information	12
Chapter 2 Setting up Barcode Solution	15
Setting up the Barcode Solution environment	15
Configuring asset merge settings	16
Creating a synchronization profile	17
Creating a synchronization template	18
Installing Barcode software on the host computer and on the handheld device	18
Chapter 3 Managing assets using Barcode Solution	21
About performing asset management tasks using Barcode Solution	21
Performing asset management tasks using Barcode Solution	22
Synchronizing data between the barcode device and Notification Server	23
Scanning assets	24
Searching for a barcode value in Barcoder	26
Adding a barcode value to an existing asset in Barcoder	27
Creating a new asset in Barcoder	28
Uploading data from the barcode device	30
Verifying asset data	30
Resolving conflicts	31
Viewing Barcode Solution reports	31
About barcode sheets	32

Chapter 4	About the Barcoder	35
	About the Asset Scan template	35
	About the Quick Scan template	36
	About the Location Scan template	37
	About the Owner Scan template	37
	About the Assign Barcode template	38
	About the Asset Replacement template	38
	About the Receiving template	39
	About the New Asset template	39
	About the Purchase Order Receiving template	40
	About the Search template	40
	About the Inventory Browse template	41
	About the Location Audit template	42
	About the RFID Audit template	42
	About the Preferences screen	42
Index		43

Introducing Symantec Barcode Solution

This chapter includes the following topics:

- [About Barcode Solution](#)
- [What you can do with Barcode Solution](#)
- [Components of Barcode Solution](#)
- [What's new in Barcode Solution 7.1 SP2](#)
- [Where to get more information](#)

About Barcode Solution

Barcode Solution provides your organization with a simpler, more accurate way of gathering and verifying asset information in the field. This solution integrates information directly into Altiris Asset Management Solution and Altiris CMDB Solution so that data input errors, accounting irregularities, and redundancies are eliminated.

See “[What you can do with Barcode Solution](#)” on page 10.

See “[Components of Barcode Solution](#)” on page 11.

Barcode Solution lets you do the following:

Speed up asset data entry and reduce errors	Manual data collection is slow and error prone. For example, a well-trained data entry operator makes a data entry error once every 300 keystrokes. Barcode Solution saves you time and money by increasing the input speed and accuracy. A barcode system is significantly faster (approximately 15 times faster) and more accurate (approximately 10,000 times more accurate) than manual data entry systems.
Track and audit assets	Assets that cannot be automatically discovered through network connections can be easily tracked within the enterprise application with Barcode Solution. Your asset data can be downloaded to a barcode device that is taken to the asset location and then is verified. New asset data can also be collected while in the field. Barcode Solution makes it easy to synchronize data with the enterprise application.
Manage inventory	The barcode system makes the inventory in the field visible to the warehouse regardless of where your assets are located. Your warehouse can prepare accurate replacements and orders by using an up-to-the-minute inventory of your stock availability.

What you can do with Barcode Solution

Barcode Solution provides many features, including the following:

- When data is synchronized with a barcode device (either downloading or uploading), only new or changed data is uploaded, unless you do an initial download.
- Quickly and accurately input asset information
- Download data to barcode devices
- Track assets within an enterprise application
- Inventory at field locations is visible to the warehouse for efficient inventory management
- Works with Radio Frequency Identification (RFID) dot point tracking
- Integrates with other IT tools, including Altiris Asset Management Suite and Altiris CMDB Solution
- Supports Code 39, Code 128, Interleaved 2 of 5, and UPC barcode symbologies formats
- Supports numerous barcode devices.
- Enables the admin user to create custom workflow templates for asset view, create, and update purposes.

See “[About Barcode Solution](#)” on page 9.

See “[Components of Barcode Solution](#)” on page 11.

Components of Barcode Solution

Barcode Solution has the following components:

Barcode Solution elements	The Barcode Solution elements are installed on and work with Symantec Management Platform. They include reports, Synchronization Profiles , Synchronization Templates , Barcoder Console Application, and the Resource Uploads page. Synchronization Profiles represent the dataset that is downloaded to a Barcode device. Synchronization Templates enable admin users to define custom workflow templates. The Resource Uploads page enables you to verify that the data is uploaded from devices or the console before they are committed to the Configuration Management Database.
Barcoder Console Application	The Barcoder Console Application provides all the workflow and features of Barcoder onto a host computer. The application is an ActiveX control that launches when a user visits the Symantec Barcode Console Application page. Barcoder Console Application does not show a logon page when a user requests data synchronization and uses the logged on users' credentials automatically. ActiveX does not provide scanner support but you can make use of the Keyboard Data wedge of a desktop barcode scanner. RFID Audit and Scanner Preferences are also not available on Barcoder Console Application as they are relevant to a handheld device.
Barcode Manager	The Barcode Manager is the installer that lays down the files on the host computer (client workstation) needed to run the Barcoder Console Application. The installer enables communication with a cradled device to launch the Barcoder on a device when you click Synchronize on the Synchronization Profiles page.
Barcoder	Barcoder runs on the barcode device and can also run on a host computer which is termed the Barcoder Console Application. Barcoder helps you perform a physical inventory of all assets, add information to an asset, and add new assets to your database. A host computer can be used to synchronize data with barcode devices, although wireless features eliminate the need for a host computer. In many cases, the host computer is connected to a cradle, into which the barcode device is placed for synchronization.

Barcode device	The barcode device is a handheld device or another piece of equipment that can scan barcode information and runs on the Pocket PC operating system. See “ About Barcode Solution ” on page 9. See “ What you can do with Barcode Solution ” on page 10.
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What's new in Barcode Solution 7.1 SP2

In the 7.1 SP2 release of Barcode Solution, the following new features are introduced:

Table 1-1 List of new features

Feature	Description
New supported devices.	Barcode Solution now supports the following new devices: <ul style="list-style-type: none"> ■ Socket Cordless Ring Scanner / CRS 9P, Bluetooth ■ Motorola MC 75 / MC 75A6, Windows Mobile 6.5.3 Professional ■ Motorola MC 55 / MC 55A0, Windows Mobile 6.5.3 Professional ■ Honeywell Dolphin / 6000, Windows Mobile 6.5.3 Professional
Barcode Manager runs on .NET 3.5.	Barcode Manager has been updated to run on .NET 3.5.
Performance improvements.	The performance of the application startup time and form loading time has been improved. The performance of the pickers for large datasets has been improved.

See “[About Barcode Solution](#)” on page 9.

Where to get more information

Use the following documentation resources to learn about and use this product.

Table 1-2 Documentation resources

Document	Description	Location
Release Notes	Information about new features and important issues.	The Supported Products A-Z page, which is available at the following URL: http://www.symantec.com/business/support/index?page=products Open your product's support page, and then under Common Topics , click Release Notes .

Table 1-2Documentation resources (*continued*)

Document	Description	Location
User Guide	Information about how to use this product, including detailed technical information and instructions for performing common tasks.	<ul style="list-style-type: none"> ■ The Documentation Library, which is available in the Symantec Management Console on the Help menu. ■ The Supported Products A-Z page, which is available at the following URL: http://www.symantec.com/business/support/index?page=products Open your product's support page, and then under Common Topics, click Documentation.
Help	<p>Information about how to use this product, including detailed technical information and instructions for performing common tasks.</p> <p>Help is available at the solution level and at the suite level.</p> <p>This information is available in HTML help format.</p>	<p>The Documentation Library, which is available in the Symantec Management Console on the Help menu.</p> <p>Context-sensitive help is available for most screens in the Symantec Management Console.</p> <p>You can open context-sensitive help in the following ways:</p> <ul style="list-style-type: none"> ■ The F1 key when the page is active. ■ The Context command, which is available in the Symantec Management Console on the Help menu.

In addition to the product documentation, you can use the following resources to learn about Symantec products.

Table 1-3

Symantec product information resources

Resource	Description	Location
SymWISE Support Knowledgebase	Articles, incidents, and issues about Symantec products.	http://www.symantec.com/business/theme.jsp?themeid=support-knowledgebase
Symantec Connect	An online resource that contains forums, articles, blogs, downloads, events, videos, groups, and ideas for users of Symantec products.	http://www.symantec.com/connect/endpoint-management

Setting up Barcode Solution

This chapter includes the following topics:

- [Setting up the Barcode Solution environment](#)
- [Configuring asset merge settings](#)
- [Creating a synchronization profile](#)
- [Creating a synchronization template](#)
- [Installing Barcode software on the host computer and on the handheld device](#)

Setting up the Barcode Solution environment

Before you can use the features of Barcode Solution, you must set up your environment.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

Table 2-1 Process for setting up the Barcode Solution environment

Step	Action	Description
Step 1	Configure asset merge settings.	You can specify the merge keys. When a match of a specified key is found during upload, the duplicate resources are automatically merged. See “ Configuring asset merge settings ” on page 16.
Step 2	Create a synchronization profile.	A synchronization profile lets you determine what data is sent from the Configuration Management Database (CMDB) to a particular handheld device. See “ Creating a synchronization profile ” on page 17.

Table 2-1Process for setting up the Barcode Solution environment (*continued*)

Step	Action	Description
Step 3	Install Barcode software on the host computer and on the handheld device.	Barcode software lets you synchronize data between the CMDB and the barcode device. You install Barcode Manager on the host computers and then use the host computers to install Barcoder on the handheld devices. See " Installing Barcode software on the host computer and on the handheld device " on page 18.
Step 4	Perform initial data synchronization.	Initial synchronization uploads the data from the CMDB to the barcode device. In the Symantec Management Console, on the Synchronization Profiles page, you can specify what data you want to synchronize. See " Synchronizing data between the barcode device and Notification Server " on page 23.

Configuring asset merge settings

The asset merge feature prevents duplicate assets from appearing in your database. During the data upload, based on the keys that you select, assets with duplicate keys are merged to form one asset in the system.

When assets are merged into one, their data is summed up. For example, you create a cell-phone resource and specify manufacturer, model, and barcode 10001. If you create another cell-phone asset with status, comments, and barcode 10001, then these two assets are merged based on the barcode. The resulting asset has manufacturer, model, barcode, status, and comments pulled into one asset. If the data classes on both assets which were merged contain data, then the data from the last uploaded asset is written to the Configuration Management Database (CMDB). For example, consider an asset had manufacturer ABC. If another asset with the same barcode is uploaded with manufacturer XYZ, then the merged assets show the manufacturer as XYZ.

You can merge multiple keys, but you must ensure that all keys match. For example, you check **Barcode** and **Serial Number** and then you upload the resource from a barcode device. The key only merges with an existing resource if both the barcode and the serial number match.

This task is a step in the process for setting up the Barcode Solution environment.

See "[Setting up the Barcode Solution environment](#)" on page 15.

To configure asset merge settings

- 1 In the Symantec Management Console, on the **Settings** menu, click **All Settings**.
- 2 In the left pane, expand **Service and Asset Management > Barcode Solution Settings**, and then click **Merge Settings**.
- 3 On the **Merge Settings** page, check the parameters that you want.
When a match of a checked parameter is found during upload, the duplicate resources are automatically merged. In most cases, **Resource Name**, **System Number**, **Serial Number**, and **Barcode** are checked.
- 4 Click **Save Changes**.

Creating a synchronization profile

Before you can download asset data to the barcode device, you need to create synchronization profiles for the users who scan the assets. A synchronization profile lets you determine what information is sent to a handheld device. For example, you can create a profile that sends the asset data that is associated with a particular location to a handheld device.

When you initialize your handheld device, you need to select the synchronization profile that is used for this device. If you have not created synchronization profiles, you can select the default profile first and change this selection later.

This task is a step in the process for setting up the Barcode Solution environment.

See “[Setting up the Barcode Solution environment](#)” on page 15.

To create a synchronization profile

- 1 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Barcode**.
- 2 In the left pane, right-click **Synchronization Profiles**, and then click **New > Synchronization Profile**.
- 3 In the right pane, specify the synchronization profile settings that you want.

The **Bypass upload verification** option lets you determine how the data is uploaded. If a profile is set to upload automatically, then the data is immediately entered into the database. If the profile is not configured to upload automatically, then the data is loaded into a verification queue which is called the **Resource Uploads**. The data remains pending administrator or manager approval through the **Resource Uploads** page in the Symantec Management Console.

- 4 Click **Save changes**.

Creating a synchronization template

In addition to the **System Templates** that are available on the **Synchronization Profile** page, on the **Permissions** tab, you can create your own custom templates. With custom templates you can create customizable fields and menu options. After you create a custom template, it appears on the **Permissions** tab, under **Custom Templates** of any synchronization profile.

To create a synchronization template

- 1 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Barcode**.
- 2 In the left pane, right-click **Synchronization Templates**, and then click **New > Synchronization Template**.
- 3 On the **Template design** tab, specify the synchronization template settings that you want.
- 4 Click **Save changes**.
- 5 (Optional) On the **Template Preview** tab, click **Preview** to see how the custom template displays on Barcoder.

Installing Barcode software on the host computer and on the handheld device

Barcode Manager enables communication between the barcode handheld application and Notification Server. You install Barcode Manager on the computers that become hosts for barcode scanning devices.

The following components must be installed on the host computers on which you plan to install Barcode Manager:

- Microsoft ActiveSync 4.5 (on Windows XP computers) or Microsoft Windows Mobile Device Center 6.1 Driver for Windows Vista (on Windows 7 computers)
- Microsoft SQL Server Compact 3.5 SP1 for Windows Desktop or greater
- Microsoft .NET Framework 2.0 or greater

After you install Barcode Manager on the host computer, you use the host computer to deploy Barcoder on the handheld devices. Barcoder is a program that helps you scan, collect, and enter data. Note that Barcode Solution does not upgrade the

previous version of Barcoder on the barcode device. You must uninstall the previous versions of Barcoder manually.

After you install the Barcode software, the handheld devices can communicate with Notification Server whenever they are connected to the host computers.

This task is a step in the process for setting up the Barcode Solution environment.

See “[Setting up the Barcode Solution environment](#)” on page 15.

To install Barcode software on the host computer and on the handheld device

1 On the host computer, do the following:

- Make sure that you are logged in with a user account that has the local administrator rights.
- Close all Windows applications that are running.
- Make sure that the Notification Server computer is added to the trusted sites list in Internet Explorer.
- Open the Symantec Management Console and log in using an account that has access to the **Barcode Solution** home page.

2 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Barcode**.

3 On the **Barcode Solution** home page, in the **Quick Links** Web part, click **Install Barcode Manager**. Follow the prompts to completely install Barcode Manager.

On the **Select Installation Type** page, select **Complete**, and click **Next**.

When the installation finishes, the user is returned to the **Barcode Solution** home page.

4 Initialize the handheld device. Align the screen, set the time, and create a Device ID and Owner ID.

5 On the **Barcode Solution** home page, in the **Quick Links** Web part, click the **Install / Launch Barcoder on device**. Follow the prompts to install Barcoder on the device.

Note that the handheld device must be cradled to the host computer before you click the link.

Installing Barcode software on the host computer and on the handheld device

Managing assets using Barcode Solution

This chapter includes the following topics:

- [About performing asset management tasks using Barcode Solution](#)
- [Performing asset management tasks using Barcode Solution](#)
- [Synchronizing data between the barcode device and Notification Server](#)
- [Scanning assets](#)
- [Searching for a barcode value in Barcoder](#)
- [Adding a barcode value to an existing asset in Barcoder](#)
- [Creating a new asset in Barcoder](#)
- [Uploading data from the barcode device](#)
- [Verifying asset data](#)
- [Resolving conflicts](#)
- [Viewing Barcode Solution reports](#)
- [About barcode sheets](#)

About performing asset management tasks using Barcode Solution

After you set up Barcode Solution, barcode devices are ready to scan the assets.

See “[Setting up the Barcode Solution environment](#)” on page 15.

When you want to inventory or manage your assets, the data for the assets should already be loaded into your barcode device. You then scan the barcode of each asset. As each asset is scanned, the data for the asset is displayed in Barcoder, and the scan time and date is recorded automatically.

The barcode device lets you perform different asset management tasks. For example, you can inventory your assets, add new assets, or update the data of existing assets. After you scan and collect barcode data, you synchronize it with the Barcode Solution that runs on the Notification Server computer. In the Symantec Management Console, you then verify the data and resolve conflicts. After you process the data, you can run reports to determine which assets were inventoried, added, or modified.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

Performing asset management tasks using Barcode Solution

Barcode Solution lets you perform different asset management tasks. For example, you can inventory your assets, add new assets, or update the data of existing assets.

See “[About performing asset management tasks using Barcode Solution](#)” on page 21.

Table 3-1 Process for performing asset management tasks using Barcode Solution

Step	Action	Description
Step 1	Synchronize data	To inventory or manage your assets, you must load the asset data from the Configuration Management Database (CMDB) into your barcode device. See “ Synchronizing data between the barcode device and Notification Server ” on page 23.

Table 3-1 Process for performing asset management tasks using Barcode Solution (*continued*)

Step	Action	Description
Step 2	Scan assets.	<p>While you scan assets, you can perform different asset management tasks. For example, you can inventory assets, update the data of existing assets, or create new assets.</p> <p>See “Scanning assets” on page 24.</p> <p>See “Searching for a barcode value in Barcoder” on page 26.</p> <p>See “Adding a barcode value to an existing asset in Barcoder” on page 27.</p> <p>See “Creating a new asset in Barcoder” on page 28.</p>
Step 3	Upload data from the barcode device.	<p>After you scan the asset data, you upload it from your handheld device to Notification Server.</p> <p>See “Uploading data from the barcode device” on page 30.</p>
Step 4	Verify the asset data.	<p>By default, you need to verify the scanned asset data before you can load it into the CMDB. You verify the data in the Symantec Management Console, on the Resource Upload page.</p> <p>See “Verifying asset data” on page 30.</p>
Step 5	Resolve conflicts.	<p>On the Resource Uploads page, you can also view and resolve the conflicting data that Notification Server detects.</p> <p>See “Resolving conflicts” on page 31.</p>
Step 6	(Optional) Run reports.	<p>After you load the scanned data into the CMDB, you can view the reports of data exchanges.</p> <p>See “Viewing Barcode Solution reports” on page 31.</p>

Synchronizing data between the barcode device and Notification Server

When you perform the initial synchronization, any data that is specified on the **Synchronization Profiles** page is uploaded to the barcode device. The initial

synchronization may involve the transfer of a significant amount of data. Ensure a good connection (either wireless or through a cradle) with the Notification Server computer.

All subsequent synchronizations only upload or download the changed data or the new data. This process is known as a delta synchronization.

Note that the profiles affect synchronization. If you change the profile that you use, then you must complete a full download again.

This task is a step in the process for setting up the Barcode Solution environment and for performing asset management tasks using Barcode Solution.

See “[Setting up the Barcode Solution environment](#)” on page 15.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To synchronize data between the barcode device and Notification Server

- 1 Make sure that the barcode device has a connection to the host computer, either wireless or through a synchronization cradle.
- 2 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 3 On the **Home** screen, click **Synchronize**.
- 4 Enter your Notification Server credentials and click **Login**.

For more information about how to authenticate a handheld device with Barcode Solution, see the following article:

[How do users authenticate a handheld device with Barcode Solution?](#)

Your password and user name are cached for an hour on the handheld device. If you do not use the device for more than an hour, you must reenter your security credentials. Closing the application clears the cached credentials. You must reenter them the next time that you launch the application.

- 5 Select the synchronization profile to use, and click **Next**.
- 6 Select one of the synchronization options, and click **Sync**.

Scanning assets

After the asset data has been synchronized with the barcode device, you can start scanning your assets.

See “[Synchronizing data between the barcode device and Notification Server](#)” on page 23.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To scan assets

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click one of the following:
 - **View > Asset Scan**
Lets you quickly view an asset without making changes to it.
See “[About the Asset Scan template](#)” on page 35.
 - **Update > Quick Scan**
Lets you scan your assets or assign details to assets such as owner, cost center, and status.
See “[About the Quick Scan template](#)” on page 36.
 - **Update > Location Scan**
Lets you set the location of an asset before scanning.
See “[About the Location Scan template](#)” on page 37.
 - **Update > Owner Scan**
Lets you set the owner of an asset before scanning.
See “[About the Owner Scan template](#)” on page 37.
 - **Update > Assign Barcode**
Lets you add a barcode to an asset when a serial number is scanned.
See “[About the Assign Barcode template](#)” on page 38.
 - **Update > Asset Replacement**
Lets you retire an existing asset and copy its key associations to the asset that replaces it.
See “[About the Asset Replacement template](#)” on page 38.
 - **Create / Receive > Receiving**
Lets you enter new assets into your system.
See “[About the Receiving template](#)” on page 39.
 - **Create / Receive > New Asset**
Lets you create a new asset by first selecting the asset type.
See “[About the New Asset template](#)” on page 39.
 - **Create / Receive > Purchase Order Receiving**
Lets you receive items against a purchase order or an invoice.
See “[About the Purchase Order Receiving template](#)” on page 40.
 - **Search**
Lets you find and view any resource whose data classes correspond with the search fields.

See “[Searching for a barcode value in Barcoder](#)” on page 26.

See “[About the Search template](#)” on page 40.

■ **Audit > Inventory Browse**

Lets you view the folder hierarchy for all resources types.

See “[About the Inventory Browse template](#)” on page 41.

■ **Audit > Location Audit**

Lets you select or scan a location barcode.

See “[About the Location Audit template](#)” on page 42.

■ **Audit > RFID Audit**

Lets you view the list of all RFID tags that have been scanned.

See “[About the RFID Audit template](#)” on page 42.

3 Scan the barcode.

The Barcoder Handheld application supports the following scanning modes:

Auto Scan

Auto Scan is enabled by default for both standard templates and custom templates and lets you scan a barcode regardless of the current field selected. It automatically updates the selected values for association pickers based on the type of the resource that was scanned. For example, if a **Location** association exists on the template, scanning a location barcode automatically updates the **Location** field with that resource.

Direct Scan

Direct Scan lets you scan directly in the currently focused field. To enable **Direct Scan**, click **Menu > Scan Mode > Direct**.

4 Repeat this procedure until all of the assets are scanned.

Searching for a barcode value in Barcoder

Searching for a barcode value helps you ensure that the asset has not already been added or that the barcode value is not already in use by another asset. Search for the barcode of an asset before you add its value to any existing asset or create a new asset.

You can enter as much of the name as you remember in the **Name** field. If asset is named ‘Asset’, searching for ‘as’ shows the required asset, but if you search ‘set’ the result does not display the asset.

If the barcode is not found on the barcode device then you can create a new asset. Ensure that you check **Create new asset on unknown barcode** before you scan

the barcode. Once you have created the new asset you can use the barcode device again.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To search for a barcode value in Barcoder

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Search**.
- 3 Do one of the following:
 - Use your barcode device to scan the barcode.
 - Select the fields that you want to search.
- 4 Click **Find**.

Adding a barcode value to an existing asset in Barcoder

For an asset whose data is already on the barcode device, you can use the barcode device to add a barcode value for the asset.

If you attempt to assign a barcode to another asset that is already used, a dialog box is displayed. The dialog box informs you of the resource that the barcode is already assigned to. You are not allowed to assign that barcode to the current asset.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To add a barcode value to an existing asset in Barcoder

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Search**.
- 3 Select the desired search options and click **Find**.
See “[Searching for a barcode value in Barcoder](#)” on page 26.
- 4 Select the resource from the list.
- 5 On the **View** screen, click **Edit**.

- 6 Click the **Barcode** tab, and then scan the barcode.
- 7 Click **Save**.

Creating a new asset in Barcoder

Normally, asset data is added through the Symantec Management Console and is downloaded to the barcode device. As you perform barcoding functions, the asset data is available for adding a barcode value or inventorying. If an asset has an unknown barcode or if it does not have a barcode, you can add it with Barcoder.

To increase productivity, use Barcoder only to add enough information to uniquely identify an asset. You can then use the Symantec Management Console to add the remaining data.

When you add new assets to the asset database, you can save time by preparing barcodes ahead of time. For example you can create barcodes for the name of the company and for common assets. You can then select the appropriate field and scan the value into the field rather than keying it in to save time and errors. If you regularly add certain computer models, you can create barcodes for your company, the computer company, and the models you buy. You can then scan the values into the appropriate fields.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

You can add a new asset with the barcode device on one of the following screens:

- **Quick Scan**
- **Location Scan**
- **Owner Scan**
- **Receiving**
- **New Asset**
- **Search**

To add a new asset on the Update screens

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Update**.
- 3 On the **Update** screen, click one of the following:
 - **Quick Scan**
 - **Location Scan**

■ Owner Scan

- 4 Check **Create new asset on unknown barcode**, and scan the barcode.
Note: The New Asset screen only appears if the barcode is new.
- 5 Select the asset type of the asset that you want to create.
- 6 You are taken to the **New Asset** screen, with the asset type entered, where you can create a new asset and add data class information. Use the arrows at the bottom of the screen to scroll through the various data class option.
- 7 Click **Save**.

To add a new asset on the Receiving screen

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Create / Receive**.
- 3 On the **Create / Receive** screen, click **Receiving**.
- 4 Enter the details under **Set Properties**, and then scan the barcode to create the asset.

To add a new asset on the New Asset screen

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Create / Receive**.
- 3 On the **Create / Receive** screen, click **New Asset**.
- 4 On the **New Asset** screen, select the asset type that you want to create.
- 5 On the new asset screen, you can add data class information and save the new asset.

Use the arrows at the bottom of the screen to scroll through the various data class options.

- 6 Click **Save**.

To add a new asset on the Search screen

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Search**.
- 3 On the **Search** screen, click **Menu > New**.
- 4 On the **New Asset** screen, select the asset type that you want to create.

- 5 On the new asset screen, you can add data class information and save the new asset.
Use the arrows at the bottom of the screen to scroll through the various data class options.
- 6 Click **Save**.

Uploading data from the barcode device

After you scan the asset data, you can upload it from your barcode device to the Configuration Management Database (CMDB). Only new or changed data is uploaded. The data is then merged with the asset data that is in the CMDB.

If you select **Bypass upload verification** on the **Permissions** tab of your **Synchronization Profile** page, the data is automatically uploaded to the CMDB. If not, the data needs to be verified on the **Resource Uploads** page.

Conflicting data is resolved on the **Resource Uploads** page in the Symantec Management Console. You can manage and resolve conflicting data in batches, or for individual resources.

Ensure that the synchronization processes are complete before you remove a barcode device from its cradle, or terminate a wireless connection.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To upload data from the barcode device

- 1 On the barcode device, click **Start > Programs > Symantec Barcoder**.
- 2 On the **Home** screen, click **Synchronize**.
- 3 Enter the Notification Server computer logon credentials and click **Login**.
- 4 Select a synchronization profile, and click **Next**.
- 5 Select a synchronization option, and click **Sync**.

Verifying asset data

By default, you need to verify your asset data before you load it into the Configuration Management Database (CMDB). You verify the data in the Symantec Management Console, on the **Resource Uploads** page.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To verify asset data

- 1 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Barcode**.
- 2 In the left pane, expand **Manage Changes**, and then click **Resource Uploads**.
- 3 On the **Resource Uploads** page, double-click **Filter Criteria** to select the version of the uploaded data that you want to verify, and resolve any resource conflicts.

See “[Resolving conflicts](#)” on page 31.
- 4 Click **Accept > Accept All and Resolve Conflicts** to save your changes to the database.

Resolving conflicts

If Notification Server detects any conflicting data, the **Resource Uploads** page shows the value of **Has Conflicts** column as **Yes**. Users can also use the filter criteria to view all the resources which are in conflict.

This task is a step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To resolve conflicts

- 1 In the Symantec Management Console, on the **Home** menu, click **Service and Asset Management > Barcode**.
- 2 In the left pane, expand **Manage Changes**, and then click **Resource Uploads**.
- 3 In the **Filter Criteria**, click **Yes** for the conflict value. Select the resource and choose **Resolve Conflict** to drill down to see the contents of resources with conflicting data.

This process only resolves the conflict, you must now accept the version to commit the changes to the database. You can repeat the same process for other conflicting data classes and associations.

Viewing Barcode Solution reports

Barcode Solution provides several reports that let you view the results of data exchanges.

For more information, see the topics about viewing and managing resource data with reports in the *Symantec Management Platform User Guide*.

This task is an optional step in the process for performing asset management tasks using Barcode Solution.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

To view Barcode Solution reports

- 1 In the Symantec Management Console, on the **Reports** menu, click **All Reports**.
- 2 In the left pane, expand **Barcode Solution Reports**.
- 3 Click the report that you want to run.

About barcode sheets

In many situations, you need to enter data for more than the identity barcode using the barcode device. If you deploy a new asset to a user, you might want to use the barcode device to quickly enter data. Data can include the assigned location, department, and cost center along with the identity. To speed up data entry and reduce data entry errors, you can create a sheet of barcodes for the frequently entered data.

See “[About performing asset management tasks using Barcode Solution](#)” on page 21.

You can use your barcode device to scan the barcode for the applicable department.

On Barcoder, the only fields which are ready to accept a barcode scan are colored gray. To read into these fields, use **Menu > Scan Mode > Direct**. This action changes the background color of the field to white when you are focused on it. Scanning the barcode writes the value into the text field. When you are ready to scan the barcode into the barcode scan control, choose **Menu > Scan Mode > Auto**. Any of the values you scanned are now read into the scan control or update the picker values if a match is found.

One suggestion for creating a barcode sheet is to use a spreadsheet. In the spreadsheet, use the first column to describe the barcode value and the next column for the barcode value. The barcode must be in the form of *XXXXXXX*, where the X's represent alphanumeric text and the *'s must begin and end the barcode. You can type the barcode value by using a font you can read. You can then highlight the barcode column and change the font to a supported barcode font.

After you complete the sheet with the desired barcodes, print the sheet and keep it close to your barcode device. When data about an asset needs to be scanned, you can also scan the other information about the asset.

The sheet might include any of the picker controls that let you scan a barcode directly.

About the Barcoder

This chapter includes the following topics:

- [About the Asset Scan template](#)
- [About the Quick Scan template](#)
- [About the Location Scan template](#)
- [About the Owner Scan template](#)
- [About the Assign Barcode template](#)
- [About the Asset Replacement template](#)
- [About the Receiving template](#)
- [About the New Asset template](#)
- [About the Purchase Order Receiving template](#)
- [About the Search template](#)
- [About the Inventory Browse template](#)
- [About the Location Audit template](#)
- [About the RFID Audit template](#)
- [About the Preferences screen](#)

About the Asset Scan template

The **Asset Scan** template lets you quickly view an asset without making changes to it. When you scan the barcode of an asset, you can see all information on that asset. To make changes to the asset, click **Edit** on the bottom of the page.

If you scan an asset that is unknown, no information is displayed. If you select **Create new asset on unknown barcode** and scan an unknown asset, the **New Asset** screen opens. From the **New Asset** screen you can create a new asset for the unknown barcode.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

About the Quick Scan template

The **Quick Scan** template lets you quickly scan your assets. When you scan an asset it is automatically updated.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

You can search and edit according to the following options:

- Name
- Barcode
- Location
- Status
- Cost Center
- Owners
- Manufacturer
- Model
- Comment

You can use this template when your assets have changed location. After the assets have been physically moved, you can use **Quick Scan** to scan the new location and all assets at that location. You can do this procedure by scanning Location barcode and then scanning all of the assets at that Location.

For example, if each office on a floor has both a location barcode and an owner barcode then you know the following information about an asset:

- The location barcode tells you which floor the asset is located on.
- The owner barcode tells you the owner of the office.

To scan all assets on the floor, you can begin at an office and scan the location barcode. The Location field autopopulates. Then select the correct status from the status list. Scan the owner barcode. The owner field auto-populates. Select **Create new asset on unknown barcode**. Then scan all assets that are in the office. All of the assets are automatically assigned to the owner and location that you scanned. You can then go to the next office and repeat this procedure.

Table 4-1 Options on the **Quick Scan** page: **Set properties** panel

Option	Description
Location	The location of the asset. You can scan a location barcode to populate this field.
Status	The status of the asset. You can scan a status barcode to populate this field.
Cost Center	The cost center of the asset. You can scan a cost center barcode to populate this field.
Owner	The owner of the asset. You can scan an owner barcode to populate this field.
Manufacturer	The manufacturer of the asset. You can scan a manufacturer barcode to populate this field.
Model	The model of the asset. You can scan a model barcode to populate this field.
Comment	Lets you enter a comment for the scanned asset.
Create new asset on unknown barcode	Lets you select an asset type and enter the information for it when you scan an unknown barcode.

About the Location Scan template

The **Location Scan** template is a subset of **Quick Scan**. It lets you set the location of an asset before scanning.

If you enable the **Quick Scan** template, you do not need to enable the **Location Scan** template. If the profile only needs to perform a location scan, you can enable and use the **Location Scan** template.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

About the Owner Scan template

The **Owner Scan** template is a subset of **Quick Scan**. It lets you set the owner of an asset before scanning.

If you enable the **Quick Scan** template, you do not need to enable the **Owner Scan** template. If the profile only needs to perform an Owner scan, you can enable and use the **Owner Scan** template.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

About the Assign Barcode template

The **Assign Barcode** template adds a barcode to an asset when a serial number is scanned. You can use this template to assign a barcode where assets already exist in your system or to scan the serial number of each asset.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[Adding a barcode value to an existing asset in Barcoder](#)” on page 27.

See “[About the Asset Replacement template](#)” on page 38.

About the Asset Replacement template

The **Asset Replacement** template lets you retire an existing asset and copy its key associations (location, owner, and cost center) to the asset that replaces it.

If an unknown asset is scanned, the **Name** field shows <Unknown>. When a known asset is scanned, you are taken to the **Retired Asset** screen.

The **Retired Asset** screen shows the details of the asset scanned. You can either cancel the flow by clicking **Cancel** or scan the barcode of the asset to replace. If you check the box **Create new asset on unknown barcode** and enter an unknown barcode in the **Barcode** text box you are taken to **Edit New Asset** screen. In the **Edit New Asset** screen the associations of the asset to be retired is shown. If a known asset barcode is scanned, you are taken to the **Replacement Asset** screen.

The **Replacement Asset** screen shows the details of the replacement asset and ability to edit the Associations. The user can modify the associations and then click **Actions > Commit** to carry out the update operation.

The following details are updated:

- Asset to retire is given **Retired** status.
- Replacement asset is given the values of associations from retired asset or the values that you have explicitly set.
- The replacement asset is given **Active** status.

To cancel the workflow click **Actions > Cancel**. This action also takes back to the **Retired Asset** screen. Alternatively, you can click **Menu > Back** to go back to the **Retired Asset** screen as well.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[About the Assign Barcode template](#)” on page 38.

About the Receiving template

The **Receiving** template can be used for entering new assets (assets you receive into your system) with or without a barcode. In this way you can quickly enter multiple similar assets into your system.

When you scan an unknown field and Direct Scan is not selected, a new asset is created. The new asset is created with the field that you scanned, and the properties that have been selected.

You can use this template if you have assets in your inventory but do not have details about them. You do not have the details to match them up with the computers that you plan to scan. You can use this template to scan in the computer data and create the new assets.

For example, you receive 50 new computers on the dock. Set Computer as the asset type. Set the location or scan a location barcode. Set the status as In Stock. Select or enter any other details on this template as needed. Enable Direct Scan. Click the box next to the serial number field. Scan the first computer's serial number. For the next computer, enable Direct Scan. Click the box next to the Serial No field. Select in the Serial No field. Scan the second computer's serial number. Repeat for the rest of the computers.

If you want to set the Name as the serial number, you can enable Direct Scan. Then click the box next to the Name field, select the Name field, and scan the computer's serial number.

When a computer is inventoried, the serial number and barcode are merged with the computer inventory. This merging occurs if the Duplicate Computer Merge policy is enabled. There must be an existing computer in the database that has the same serial number or barcode.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[Creating a new asset in Barcoder](#)” on page 28.

See “[About the New Asset template](#)” on page 39.

See “[About the Purchase Order Receiving template](#)” on page 40.

About the New Asset template

The **New Asset** template lets you create a new asset by first selecting the asset type.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[Creating a new asset in Barcoder](#)” on page 28.

See “[About the Receiving template](#)” on page 39.

See “[About the Purchase Order Receiving template](#)” on page 40.

About the Purchase Order Receiving template

The **Purchase Ordering Receiving** template lets you receive items against purchase order or invoice.

If you click **Purchase Ordering Receiving** on the **Create / Receive** screen, you open the **Purchase Orders / Invoices** screen. This screen shows a list of Purchase orders or invoices. If you then select a purchase order or invoice and click **Next**, the **Receive Items** screen opens.

On the **Receive Items** screen, line items of the selected purchase order or invoice are shown. You can then receive line items. As line items are received, the quantity reduces by one and once the last item is received, the line item row is removed. After receiving the line items, click **Menu** to go back to the list screen and select another purchase order or invoice.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[Creating a new asset in Barcoder](#)” on page 28.

See “[About the Receiving template](#)” on page 39.

See “[About the New Asset template](#)” on page 39.

About the Search template

The **Search** template lets you find and view any resource whose data classes correspond with the search fields. You can find a resource either by scanning a field or a barcode, or entering as much information as you want and selecting **Find**. You can do a partial search by name entering the first few characters of the name.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

See “[Searching for a barcode value in Barcoder](#)” on page 26.

You can scan in a field as an efficient way of searching. Barcoder automatically triggers a search.

When a gray picker field is displayed and the device beeps when you scan a barcode, the field is automatically populated. For example if you are in the **Search** screen and you scan a location tag, the Location field gets populated with that location. Then, every tag that you scan until you scan another location tag gets its filter value set, but the asset is not updated.

When you select a resource on the Results screen, the View screen appears in the Associations category, showing associations information about that asset. To view other information about that asset, scroll to the category (tab) you want and select it. These categories (tabs) are found on the bottom of the View and Edit screens.

If you have a computer and you know what its barcode is, you can scan it from this screen and its asset information displays.

Suppose you have a computer that has a damaged barcode and you need to find its information another way. You can enable direct scan for a field (make sure that the cursor is on the field), such as serial number. You can then scan the computer's serial number and the information displays.

Table 4-2 Options on the **Search** template

Option	Description
Barcode	The barcode number of the asset you search for.
Serial Number	The serial number of the asset you search for.
System Number	The system number of the asset you search for.
Type	The asset type you search for.
Location	The location of the asset you search for. You can scan a location barcode to auto-populate the Location field. This procedure lets you easily search for an asset in a particular location.
Owner	The owner of the asset you search for. You can scan an owner barcode to auto-populate the Owner field. This procedure lets you easily search for an asset of a particular owner.
Name	The name of the asset you search for. You can enter one or more characters of the name of the asset you search for.

About the Inventory Browse template

The **Inventory Browse** template displays the folder hierarchy (only the folders and not the actual resources) for all resources types (not only assets). If there are resources inside a folder, the List option appears next to the name of that folder. Clicking the List option takes you to the results list that shows all resources in that folder. To drill down into the folder, click on the folder name.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

About the Location Audit template

The **Location Audit** template allows a user to select or scan a location barcode first. Then each barcode that is scanned thereafter in **Location Audit** template is noted as an inventory item of that location at that time. This procedure does not change the “set” location against that asset. It is purely an audit of your asset’s locations. When you scan a barcode, **Location Audit** displays the Asset’s name and Barcode.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

About the RFID Audit template

The **RFID Audit** template displays a list of all RFID tags that have been scanned. Any tags that have been scanned multiple times are only reported once. When you synchronize, the data is sent to Notification Server. RFID scans allow the rapid collection of all RFID tags in a particular area. A different beep identifies unknown tags, but the scan continues unless you select the option Stop on unknown tag.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

The following information is recorded during an RFID scan:

- RFID tag identifier
- Location of scan (optional)
- Time of scan
- User who performed the scan
- User profile
- The last scan that is performed on a tag (in the event of multiple scans)

About the Preferences screen

You can open the **Preferences** screen as a menu item. The menu opens if you click **Menu > Preferences** or use the device keys to open the menu and then select preferences.

The **Preferences** screen has three tabs: **General**, **Scanner**, and **Rules**. The **General** tab provides data storage and scan preferences options. The **Scanner** tab provides the scanner selection. The **Rules** tab lets you specify rules to modify a scanned barcode or RFID value before it is passed to application workflow.

See “[Performing asset management tasks using Barcode Solution](#)” on page 22.

Index

A

- asset data
 - synchronizing 23
 - uploading 30
 - verifying 30
- asset management using Barcode Solution
 - about 21
 - process 22
- asset merge settings
 - configuring 16
- Asset Replacement 38
- Asset Scan 35
- Assign Barcode 38

B

- barcode device
 - adding barcode to an existing asset 27
 - creating new asset 28
 - scanning assets 24
 - searching for a barcode 26
 - synchronizing data 23
 - uploading data 30
- Barcode Manager
 - installing 18
 - installing on the host computer 18
- barcode sheets
 - about 32
- Barcode Solution
 - about 9
 - features and benefits 10
 - preparing to work 15
 - setting up 15
- Barcoder
 - adding barcode to an existing asset 27
 - creating new asset 28
 - installing 18
 - installing on the handheld device 18
 - scanning assets 24
 - searching for a barcode 26
 - synchronizing data 23
 - uploading data 30

C

- conflicts
 - resolving 31
- context-sensitive help 12

D

- documentation 12

H

- handheld device
 - adding barcode to an existing asset 27
 - creating new asset 28
 - scanning assets 24
 - searching for a barcode 26
 - synchronizing data 23
 - uploading data 30
- help
 - context-sensitive 12

I

- Inventory Browse 41

L

- Location Audit 42
- Location Scan 37

N

- New Asset 39

O

- Owner Scan 37

P

- preferences screen
 - about 42
- Purchase Order Receiving 40

Q

Quick Scan 36

R

Receiving 39
Release Notes 12
reports
 viewing 31
RFID Audit 42

S

scanning assets 24
Search 40
synchronization profiles
 creating 17
synchronization template
 creating 18

T

terminology
 barcode terminology 11